DIGITAL ECOSYSTEMS TRAINING PROPOSAL

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Organizational Background

Solutions Hub is a technology provider that specializes in providing enterprise technology solutions to public sector and government organizations. The company's primary products are enterprise and b2b software, hardware, and services which it resells through its partner channel network.

Solutions Hub generated $1 billion revenue in 2019. The company's revenue has increased every year since it was started in 2007, and it consistently maintains a top 25 market share in the IT solutions and services industry. Headquartered in San Francisco, CA, Solutions Hub has satellite offices throughout the United states, and each satellite office is responsible for a regional sales district.

Solutions Hub's workforce numbers 2000 nationwide, including 1000 employees based out of it its San Francisco headquarters. The inside and outside sales force totals 800 employees nationwide. The inside sales representatives work primarily from its offices in a remote sales and customer service role, supporting the outside representatives, who travel and broker face-to-face deals. Both inside and out sales representatives need to be knowledgeable in the products and services the company sells from its partners, which include major technology companies such as Microsoft, Adobe, IBM, Google, AWS, and McAfee. Professional development for sales representatives includes becoming certified in these products from these companies, where certification paths are offered.

The company's management style is decentralized and team-based, adopting a market leader strategy and delegating a great deal of business decision making responsibility to managers in its regional business units, while coordinating its business operations through a company intranet

system and collaborative business tools which include proprietary software. The company is internally heavily invested in the enterprise technology that it sells.

At the time of training development, all employees at company headquarters and at several satellite offices are working remotely from home offices due to restrictions caused the COVID-19 pandemic. It is anticipated that at some point in the future that employees will return to the office, although when a return to office may happen is unknown.

Mission Statement:

"We provide secure, cost-effective, and agile technology and services to medium and large public sector organizations."

Performance Problem

The sales representatives, particularly the inside reps, are not knowledgeable enough in the IT solutions they support and sell. They are missing revenue opportunities by failing to upsell customers on additional solutions. These solutions, known collectively as the Digital IT Ecosystem, are divided into four segments – End User Computing, Applications, Security, and Cloud. Information about products in these segments is stored in an online content library that employees can access via a proprietary software application.

A training needs analysis conducted by the instructional design team found that online traffic to the content library was below expected metrics. It also found that, through an anonymous survey of sales reps that 35% of those surveyed had never used the solutions library, and of those that have used it, 75% only use it a handful of times a month. Those surveyed who did use the solution library rated it favorably (3.75 out 5 on a Likert Scale), meaning the lack of use appears to more of knowledge issue, than a usability issue with the application itself. In terms of the

Digital Ecosystem segment knowledge, Security and Cloud Infrastructure Solutions were the segments that respondents self-assessed as being the least familiar with.

The learner analysis survey also showed the typical learner is an inside account rep who has been with Solutions Hub 1-2 years, uses Google as their primary product lookup tool, and believes the ideal length of an online training to be 10-20 minutes. The less experienced reps tended to use the Solutions Library the most. Finally, of the outside sales reps surveyed, 100% reported using the Solutions Library.

The TNA determined that the knowledge gap in Digital Ecosystems products was a problem that could be solved through training. Survey responses showed user experience with the content library itself was not a primary issue. Inability to synthesize the information related to digital ecosystem solutions, and lack of knowledge about the Solutions Library and how it can be used are the problems.

Anticipated Performance Improvement

The instructional design team has been tasked with creating a blended training course for sale reps to get "certified" in the digital IT ecosystem. It is anticipated that this training will help reps better understand what they are selling and how they are selling, and where to go to obtain this information at the moment of need, so that for example, while quoting a customer, the sales rep will be able to say, "We are quoting this customer for a server, and we should quote them for security as well."

Training Methods and Techniques

The sales training team has requested that the instructional design team to build a Digital IT Ecosystem curriculum around the 4 solutions - End User Computing, Infrastructure, Security,

and Applications. They want to make this course has interactive as possible, and cited as an example a training from one of Solutions Hub's partners, Logitech, which implemented a "12 Days of Summer" series where the can learner view short videos/documents and take quizzes to test their knowledge. The Association for Talent Development (ATD) calls this style of training *microlearning*. ATD defines microlearning as an "instructional unit that provides short engagement in an activity intentionally designed to elicit a specific outcome from the participant (Kapp & DeFelice, p. 11). Each piece of content should be limited to one learning objective, and can be up to 20 minutes long, but ideally should be around five minutes. "To be effective, microlearning must fit into the daily workflow, engage employees in voluntary participation, be based on brain science (how people actually learn), adapt continually to ingrain the knowledge employees need to be successful, and ultimately drive behaviors that impact specific business results" (Dillon, 2018, as cited in Kapp & DeFelice, p. 10). The instructional design team, after completing their training needs analysis, has determined that this subject matter is a good fit for microlearning because it can be broken down into small chunks and there is need to make it accessible to mobile users, and thus more *bite-sized*.

Digital Ecosystems will be a blended training that is a combination of online, virtual classroom, and on-the-job training. Because the audience is spread out over multiple geographic locations, and is currently working 100% remotely, classroom training must be conducted virtually. Online training would also be more cost-effective than sending trainers onsite to remote location. The training will consist of three parts: the first part will be online asynchronous e-learning delivered in modules that will be easily accessible for both employees working from computers, and outside sales reps on their company-issued tablets or smartphones when they are in the field. Design for these modalities considers both the current conditions, and the

anticipation of a return to something resembling the pre-pandemic working environment. The asynchronous e-learning will be a series of microlearning modules, with quizzes to test retention.

Upon completion of all modules, trainees will attend a virtual “in-person” workshop. The workshop will allow employees to practice the selling component of Digital Ecosystems with other reps in a guided environment under instructor supervision. The workshop will be a simulation which will give participants the opportunity to practically apply what they learned in the modules. Completion of both the e-learning modules and the workshop will be required to obtain the Digital Ecosystems certificate. All certification progress will flow through, and be tracked in, a learning management system which the company has already implemented.

In addition to the e-learning and in-person training, there will be an on-job-component in form of job aids that can give employees access to key information at the moment of need.

Digital Ecosystems will an ongoing training, with new reps continually doing the modules then taking the in-person training. Given the cyclical nature of this training, it is expected that there will be continual need to change and adapt the contents. The instructional design team will use a modified approach to ADDIE that is based on the AGILE approach used in IT project management. The difference with AGILE is that, according to Torrance (2019) rather than assuming the initial analysis covered everything and creating a single final product, the team will continuously return to design and development after successive evaluations. In doing to so the team can best accommodate training and environmental change (p. 7). The first learner class will also function as a pilot testing group for initial revisions.

The primary authoring tool used to develop the e-learning modules will be Articulate Rise, a web-based application for the design in rapid of development of interactive and *responsive*

courses. Marcotte (2011) describes responsive design as web design that can adapt to the constraints of the browser window or device that renders the course, creating a design that responds the user's needs (p. 9). In terms of e-learning, responsively designed e-learning courses render as a web that can meet a learner's viewing needs on a desktop PC, tablet, or smartphone. This will enable to the team to design one layout for each course that will be viewable by both sales reps working from their computers, and reps working from their mobile devices in the field or at home.

Goals

The goal is for new reps to get "certified" in the digital IT ecosystem before being placed on their sales team. Learners will be able to carry on a fluent conversation about each of the four Digital Ecosystem segments and make product recommendations, using the Solutions Library as a reference tool. A secondary goal is to increase awareness and knowledge of the Solutions Library as a tool that is available to the sales reps.

Training Outline

- E-Learning
    - Introduction video (5 minutes)
        - A video less than five minutes in length orientating the learner to the course goals and objectives, and pitching the Solutions Library as a tool that is available for the learner to use
    - Accessing the Solutions Library (5 minutes)
        - A five minute or less video showing how access the library.
    - Navigating the Solutions Library (5 minutes)

        - Video walking through how to use the interface and look up solutions
        - Accompanying job aid
    - Identify End User solutions (10 minutes)
        - Rise module + quiz
    - Identify Applications solutions (10 minutes)
        - Rise module + quiz
    - Identify Security solutions (15 minutes)
        - Rise module + quiz
    - Identify Cloud Infrastructure solutions (15 minutes)
        - Rise module + quiz
    - Digital Ecosystems Segments and Solutions summary (5 minutes)
        - Video summarizing first part of training and instructing learners on next step (in-person course registration).
        - Job aid infographic summarizing key info for all four segments
- In-Person
    - Review of e-learning and lecture
    - Real-world scenarios simulation activity

Lesson Plan

Lesson Title: Selling Digital Ecosystem Solutions

Type of Instruction: Virtual in-person

Lesson Duration: 1 hour

Required Materials:

Trainer: Solutions Hub issued computer and access to company's virtual private network and intranet, Microsoft Teams virtual meeting, PowerPoint deck for lecture, access to live Solutions Library application, participant roster and transcript records (from LMS)

Participant: Solutions Hub issued computer or mobile device and access to company's virtual private network and intranet, Microsoft Teams virtual meeting invitation with link to meeting room.

Performance Objectives:

Upon completion of this lesson, the learner will:

1. Given real world scenarios, in written form and class discussion, identify examples of situations where they can use the Solutions Directory in when quoting a customer.
2. Given commonly sold technology products in each of the four Digital Ecosystem Segments, in written form find additional products using the Solutions Library.
3. Given the products found in Objective #2, in written form respond to a simulated quote request with appropriate upsell recommendations in an email.

Instructional Content:

1. Presentation (15 minutes)

   Presenter briefly reviews the content learned in the online course. After the quick refresher, the trainer will then demonstrate the objectives using sample quotes to show specific examples of additional revenue opportunities, and also where opportunities were missed.
2. Lab (30 minutes)

The application part of the training will consist of a lab with two 15-minute activities: In Par 1, learners will then be presented with series of technology products, then be required to work on their own to source related products in the Solutions Library. They will be given ten minutes to complete this activity.

In Part 2 of the lab, using items sourced in Part 1, learners will be sent several fake a quote request email, and required to create a quote which includes additional appropriate to the customer's initial request. They will be given 20 minutes to complete this activity

3. Summary and Review (15 minutes)

   The instructor will reconvene the class and review the lab results with the group. The review will encompass both the items sourced, and the quotes. This time will also be allocated for a question & answer session.

   Evaluation surveys will be sent by email after the class and will not be done in class.

Time Schedule

Start date: Rolling. First sales reps to be assigned e-learning course on: February 1st, 2021

Length of online training: 1 hour

Length of virtual in-person training: 1 hour

Total seat time: 2 hours

Completion date: Rolling. First virtual in-person session to be held on March 1st, 2021.

Sample Assessment Questions

1. Which of the following are lifecycle services that might be offered if the customer is purchasing new laptops?

a. Pre-deployment

b. Device rollout

c. Device management

d. All of the above

2. If a customer requests a quote for a server, you may also offer them:

a. Cybersecurity software

b. Network analysis services

c. Document management software

d. Both A and B

3. Security solutions primarily help organizations:

a. Improve user productivity

b. Protect against cyber threats

c. Manage IT assets

d. Store data in the cloud

Budget

Costs

First Year Costs for Development and Implementation of Blended Instruction

Design and Development Costs	
1. Personnel – 100 instructional design hours at $40 per hour	$4000

2. Personnel - SME consultation with two trainers at $30 per hour	$1200
3. Materials - Authoring and design tools (software & licensing costs)	$1500
Direct Training Costs	
1. Personnel - Forty hours of trainer's time for two trainers at $60000 per year*	$2400
Indirect Costs	
1. Personnel - One day of trainer preparation at $60000 per year for two trainers	$480
2. Materials - Cost for end user LMS access at $18 per user for 800 users*	$14400
Participant Compensation	
1. 800 employees attending two total hours of e-learning and of virtual in-person training at $40000 per year*	$32000
Evaluation and Revision Costs	
1. Iterative evaluation design costs – 50 estimated instructional design hours	$2000
2. SME consultation with trainers (5 hours)	$600
3. **Facilities, Equipment, and Travel costs**	$0
Total	$58580.00

*Cost for training 800 sales employees in groups of 20 per virtual in-person session	

Evaluation and ROI Analysis

This training will use the Kirkpatrick Model as an evaluation framework for continually revising this training.

Level 1 (reaction) surveys will be sent to participants after completion of the online and in-person trainings. Online and in-person have different sets of reaction criteria and need to be evaluated separately. Completion of both surveys will be required to obtain the certification.

A Level 2 (learning) survey will be sent to participants 30 days after rollout, then after that once per business quarter to new "graduates", and measured in combination with quiz results (see Sample Quiz Questions) to evaluate the degree to which participants acquired the intended KSA's.

Level 3 (behavior) will be evaluated quarterly using a combination of manager feedback and reporting data on sales metrics to evaluate degree to which participants are applying what they learned during the training program to quote and sell additional items.

Finally, Level 4 (results) will evaluate return on investment (ROI) by comparing targeted growth metrics year-over-year against the cost of training. L&D will work with Sales to determine the best metrics with which to evaluate this training. An example ROI evaluation might look like:

$$[(Y/Y\ target\ metric - Cost\ of\ Training)/Cost\ of\ Training] \times 100 = ROI$$

Summary

Digital Ecosystems training is a sales training for an IT business that uses blended learning which combines micro e-learning content with an interactive virtual in-person training to certify employees in Digital Ecosystems, with the goal of improving sale employee knowledge of the products they are selling in order to increase revenue. The training will be required of all sales employees and offered on a continuously rolling basis. The budget is for Year One. There is an expectation that this training will require continuous evaluation and revision to keep the training current, as technology is constantly changing.

References

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